Published on *University of Colorado* (https://www.cu.edu)

OnBase Training [1]

Welcome to the OnBase training page! On this page you will find Quick Reference Guides for End Users and Guides for OnBase Certified Administrators.

How to Access OnBase

Web links and Client Installation

The OnBase platform has two clients for end users:

1. Web client (browser based)
2. Unity client (Windows only, desktop client)

To install the Unity client or access the web client, please refer to the OnBase Web Client and Unity Client Links [2] guide. Both the web client and Unity client require that you are connected to a campus network or VPN.

Please note that the Unity client has a number of software dependencies [3] that may require IT support for installation. Also note that the Unity client is a "ClickOnce" application and is designed to be installed by the end user on a computer, it does not require IT support for installation once the software dependencies have been met. You must initiate the install of OnBase "ClickOnce" clients using Internet Explorer or Edge only. Other browsers like Firefox and Chrome do not support ClickOnce installers and will cause the ClickOnce installation to fail if they are used when opening a ClickOnce URL. For more details please review the OnBase Technical Support page [3].

You can also access the Web client from the Campus Portals [4] via the OnBase tile on the CU Resources page.

Access to OnBase Content

By default all university employees (including student employees) will have access to the OnBase platform, but limited or no access to content or processes.

For questions regarding OnBase access to **student content**, please reach out to your respective campus access coordinator [5]. Each campus has module access coordinators that review and provision the appropriate access. To request access, please fill out the CU-SIS Access Request form [6] and indicate OnBase access is needed.

For questions regarding OnBase access to **any other content**, please reach out to the relevant OnBase Certified Department Administrators [7] or the UIS Enterprise Content Service Team [8].

OnBase Quick Reference Guides for End Users

Unity Client Quick Reference Guide [9]

Web Client Quick Reference Guide [10]

Microsoft Office Client Guide [11]

Client Functionality Comparison [12]

Retrieving Documents

Related Actions and Related Content [13]

Retrieving content - Unity Client [14]

Retrieving content - Web Client [15]

Submitting (Importing) Documents

Submitting content - Unity Client [16]

Submitting content - Web Client [17]

Scanning Documents

Scanning documents - Unity Client [18]

Scanning Quick Reference Guide - Unity Client [19]

Indexing Documents

Indexing documents - Unity Client [20]

Indexing documents - Web Client [21]

Hyland (vendor) Resources for End Users

These require creation of a Hyland profile [22] if you do not already have one. It can take a couple days for your account to be confirmed.

- End User Essentials: OnBase Foundation Unity Client [23] Explore the basic features and functionality of the OnBase Unity Client
- End User Essentials: OnBase Foundation Web Client [24] Explore the basic features and functionality of the OnBase Web Client
- Unity Forms End User Hands On Lab [25]

OnBase Guides for Certified Administrators

- **Handbook for Certified Admins** **[26]**
- OnBase Certified System Administrator Agreement [27]
- OnBase Certified API Developer Agreement [28]

Adobe Acrobat Guides

- Adobe Acrobat Optimize Scanned Documents [29]

OnBase Client Functionality & Installation Guides

- Client Functionality Comparison [12]
- Office Integration Plugin Troubleshooting [30]
- OnBase Studio - Installation and Setup [31]
- Thick Clients (Configuration and Thick Desktop Client) - Installation and Setup [32]
- Unity Client - Activate Batch Scanning License [33]
- Unity Client - Set launch defaults [34]
- Unity Management Console - Installation and Setup [35]
- Using the Upgrade Testing WorkView Application [36]

OnBase Configuration Guides

- Creating OnBase Related Content links in PeopleSoft [37]
- DIP to Virtual E-Form [38]
- Document Composition Configuration [39]
- Document Packet Templates - Configuration [40]
- Exporting and Importing Configurations [41]
- Functional User Group Privileges [42]
- Naming Conventions [43]

OnBase Licensing

- Modules we own [44]

OnBase Reporting Dashboard Guides

- Reporting Dashboards Guide [45]
- Reporting Dashboards Guide - Share by URL [46]
- Administrative Dashboards [47] (link to dashboard, requires campus network/VPN connection)

OnBase Office Integration Guides

- Office Integration Plugin Troubleshooting [30]

OnBase Scheduled Import Guides

- Scan Queue - Auto Sweep Setup [48]
- Scheduled DIP/DRIP Setup [49]
- Mailbox Importer - Configuration [50]

OnBase Unity Form Guides

- Unity Form - Requirements for E-signature [51]
- Unity Form - Sharing for Public Use (Basic URL) [52]
- Unity Form - Sharing for Public Use (Integration for Portal Login or Tile) [53]
- Unity Form - Validating Field Values with RegEx [54]
- Unity Form - String Functions Script [55]
- Unity Form/Workflow - Using Preferred Name [56]

OnBase Unity Script Guides

- Unity Script - How to use the Read Environment Variable Script [57] (Workflow)
- Unity Script - How to use the Update Email Address Scripts (ICS/HCM) [58] (Workflow/Form)
- Unity Script - Reverse AFKS [59] (Workflow)
- Unity Script - MIKG Formatter [60] (Workflow)
- Unity Script - Unity Form Repeater Concatenation [61] (Workflow)
- Unity Form - Validating Field Values with RegEx [54] (Form)
- Unity Form - String Functions Script [55] (Form)

OnBase Workflow Guides

- Workflow - Commonly Used Expressions [62]
- Workflow - Export to Network Location locations [63]
- Workflow - Notifications - DocPop/WorkflowPop [64]
- Workflow - Notifications - FormPop [65]
- Workflow - Notifications - Sending SMS Notifications [66]
- Workflow - Setting up Inbox Filters [67]
- Workflow - ShareBase Interaction [68]
- Workflow - Unity Life Cycle Conversion [69]
- Workflow/Unity Forms - Using Preferred Names [56]

Integrations

- Workflow - Search Match [70]
- Workflow - ICS Checklist Update [71]
- Workflow - ICS Service Indicator Place/Release [72]
- Workflow - ICS Comment Creation [73]
- Workflow - ICS Student Group Update [74]

OnBase WorkView Guides

- WorkView Configuration Guide [75]
- WorkView for Unity Form Reporting [76]

Groups audience:
University Information Services
Right Sidebar:
UIS: Enterprise Content Services Service Catalog - OnBase
UIS - OnBase Online Training and Certifications
OnBase Training and Support
UIS - Enterprise Content Services Campus Contacts
UIS - Request Enterprise Content Services

Source URL:https://www.cu.edu/uis/onbase-training

Links
[1] https://www.cu.edu/uis/onbase-training [2] https://www.cu.edu/doc/onbase-web-urls-and-unity-client-urls-v4.pdf [3] https://www.cu.edu/uis/onbase-technical-support [4] https://www.cu.edu/doc/onbase-guide-web-client-portal.pdf [5] https://www.cu.edu/campus-access-coordinators
[6]
https://ping.prod.cu.edu/idp/startSSO.ping?PartnerSpId=SP:EnterprisePortal&TargetResource=https%3A%2F%
[7] https://www.cu.edu/uis/onbase-certified-department-administrators
[8] mailto:UIS_DM_SUPPORT@cu.edu [9] https://www.cu.edu/doc/onbase-unity-client-hyland-qrgpdf
[10] https://www.cu.edu/doc/onbase-web-client-hyland-qrgpdf [11] https://www.cu.edu/doc/onbase-office-client-hyland-qrgpdf [12] https://www.cu.edu/doc/onbase-guide-client-functionality-comparison.pdf
[13] https://www.cu.edu/doc/onbase-qrg-retrieving-content-within-campus-solutionspdf
[14] https://www.cu.edu/doc/onbase-qrg-retrieving-documents-unity-client-v3%2Cpdf
[15] https://www.cu.edu/doc/onbase-qrg-retrieving-documents-web-client-v2%2Cpdf
[16] https://www.cu.edu/doc/onbase-qrg-submitting-content-unity-clientpdf [17]
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[21] https://www.cu.edu/doc/onbase-qrg-indexing-documents-web-clientdocx
[22] https://id.hyland.com/signin/register [23] https://university.hyland.com/courses/p1813
[24] https://university.hyland.com/courses/p1812 [25] https://university.hyland.com/courses/p1799
[26] https://www.cu.edu/doc/onbase-guide-handbook-certified-admins-expectations-and-tipspdf
[27]
https://ping.prod.cu.edu/idp/startSSO.ping?PartnerSpId=SP:EnterprisePortal&TargetResource=https%3A%2F%
[28]
https://ping.prod.cu.edu/idp/startSSO.ping?PartnerSpId=SP:EnterprisePortal&TargetResource=https%3A%2F%
[29] https://www.cu.edu/doc/onbase-guide-adobe-acrobat-optimize-scanned-documentspdf
[30] https://www.cu.edu/doc/onbase-guide-office-integration-plugin-troubleshooting.pdf
[31] https://www.cu.edu/doc/onbase-guide-onbase-studio-installation-and-setup.pdf
[32] https://www.cu.edu/doc/onbase-guide-thick-client-install-and-setup.pdf
[33] https://www.cu.edu/doc/onbase-guide-unity-client-activate-batch-scanning-licensepdf

[34] https://www.cu.edu/doc/onbase-guide-unity-client-set-launch-defaults.pdf
[35] https://www.cu.edu/doc/onbase-guide-unity-management-console-installation-and-setup.pdf
[36] https://www.cu.edu/doc/onbase-guide-using-upgrade-testing-apppdf [37] https://www.cu.edu/doc/onbase-guide-creating-onbase-related-content-links-peoplesoftpdf
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[42] https://www.cu.edu/doc/onbase-configuration-functional-security-groupsxlsx
[43] https://www.cu.edu/doc/onbase-guide-naming-conventions.pdf [44] https://www.cu.edu/doc/onbase-guide-modules-we-own.pdf [45] https://www.cu.edu/doc/onbase-guide-reporting-dashboardspdf
[46] https://www.cu.edu/doc/onbase-guide-reporting-dashboards-share-urlpdf
[47] https://dm.prod.cu.edu/ReportingViewerPublic/Viewer.aspx?enc=AfkncyJSZDU%2bb7uU5vj8KgX6qg4w3KpBtkmHQ
[48] https://www.cu.edu/doc/onbase-guide-scan-queue-auto-sweep-setup.pdf
[49] https://www.cu.edu/doc/onbase-guide-scheduled-dip-drippdf [50] https://www.cu.edu/doc/onbase-guide-mailbox-importer-configuration.pdf [51] https://www.cu.edu/doc/onbase-guide-unity-form-requirements-e-signaturepdf [52] https://www.cu.edu/doc/onbase-guide-unity-form-sharing-public-use.pdf
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